

Wisconsin Housing and Economic Development Authority

Agency Performance Dashboard

Q2 FY2018

Goal Met Key

✓ goal met, ✗ goal not met, ⌚ goal in progress. As determined by comparison of current data and target.

Trend Key

↑ trending in favorable direction, ↔ trend is holding, ↓ trending in unfavorable direction.

Economic Development

Net income

Metric Definition

Continue strong earnings to support current and future operations.

Goal Met	Current	Previous	Target	Trend
⌚	\$19,276,900	\$15,123,700	\$32,474,000	↑

Reporting Cycle: Annual (state fiscal year July 1, 2017 - June 30, 2018)

Additional Details: Net income before the market rate adjustment for investments. Target represents WHEDA's net income projection represented in its FY 2017-18 budget approved by the WHEDA Members of the Board.

*The Previous column contains data for the same year-to-date time period in the prior fiscal year (FY17).

Credit rating

Metric Definition

Maintain a superior Issuer Credit Rating (ICR), which enables WHEDA to access the capital markets and obtain credit at reasonable terms.

Goal Met	Current	Previous	Target	Trend
✓	S&P: AA- Moody's: Aa3	S&P: AA- Moody's: Aa3	S&P: AA- Moody's: Aa3	↑


Reporting Cycle: Annual (calendar year)

Additional Details: WHEDA's long-term ICR and bond resolution ratings remain unchanged with a stable outlook.

Mortgage loans funded

Metric Definition

Increase Single Family mortgage loans funded.

Goal Met	Current	Previous	Target	Trend
	\$222,935,000	\$188,061,000	\$350,000,000	↑

Reporting Cycle: Annual (state fiscal year July 1, 2017 - June 30, 2018)


Additional Details: Target represents WHEDA's mortgage lending projection represented in its FY2017-18 budget approved by the WHEDA Members of the Board.

*The Previous column contains data for the same year to date time period in the prior fiscal year (FY17).

Multifamily loans funded

Metric Definition

Maintain multifamily loans funded based on current market conditions.

Goal Met	Current	Previous	Target	Trend
	\$81,530,600	\$28,065,000	\$168,797,400	↑

Reporting Cycle: Annual (state fiscal year July 1, 2017 - June 30, 2018)


Additional Details: "Target represents WHEDA's multifamily lending projection represented in its FY2017-18 budget approved by the WHEDA Members of the Board.

*The Previous column contains data for the same year to date time period in the prior fiscal year (FY17).

Economic development loans funded

Metric Definition

Maintain economic development participation loans funded based on current market conditions.

Goal Met	Current	Previous	Target	Trend
	\$2,911,000	\$2,000,000	\$5,000,000	↑

Reporting Cycle: Annual (state fiscal year July 1, 2017 - June 30, 2018)

Additional Details: Target represents WHEDA's participation lending projection represented in its FY2017-18 budget approved by the WHEDA Members of the Board.

*The Previous column contains data for the same year to date time period in the prior fiscal year (FY17).

Low-Income housing tax credit allocation

Metric Definition

Continued allocation of federal Low-Income Housing Tax Credits (LIHTC) in Wisconsin.

Goal Met	Current	Previous	Target	Trend
N/A	N/A	\$14.2 million	\$14 Million	N/A

Reporting Cycle: Annual (state fiscal year July 1, 2017 - June 30, 2018)

Additional Details: LIHTC's are allocated annually during the 3rd quarter of FY2018. Amount of allocation based on federal resources.

Housing foundation grants

Metric Definition

Continue housing grant awards of \$500,000 for special-needs housing providers.

Goal Met	Current	Previous	Target	Trend
N/A	N/A	\$500,000	\$500,000	N/A

Reporting Cycle: Annual (state fiscal year July 1, 2017 - June 30, 2018)

Additional Details: Housing grant awards are awarded annually. Award competition begins in 3rd quarter with grants allocated during the 4th quarter of FY2018.

Open and Transparent Government

Total number of public records requests received

Metric Definition

Total number of public records requests received.

Current	Previous	Trend
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17

11



Reporting Cycle: Quarterly (October 1, 2017 - December 31, 2017)

Additional Details: Executive Order #235 requires agencies to post public records metrics. Requests may be received verbally or in writing and are logged by the agency when received.

Total number of public records requests completed

Metric Definition

Total number of public records requests completed.

Current	Previous	Trend
17	11	↑

Reporting Cycle: Quarterly (October 1, 2017 - December 31, 2017)

Additional Details: Executive Order #235 requires agencies to post public records metrics. Completed or closed means no further action is required by the agency. Requests completed during this reporting cycle may have been initiated during a previous quarter.

Average time taken to fulfill public records requests

Metric Definition

Total time taken (in business days) to fulfill public records requests divided by the total number of public records requests completed in this reporting cycle.

Goal Met	Current	Previous	Target	Trend
✓	2.12 days	2.09 days	10 days	↑

Reporting Cycle: Rolling average updated quarterly (October 1, 2017 - December 31, 2017)

Executive Order #235 requires agencies to post public records metrics. Completed or closed means no further action is required by the agency. Requests completed during this reporting cycle may have been initiated during a previous quarter.

Percentage of public records requests acknowledged within one business day

Metric Definition

Percentage of public records requests sent to the agency's primary public requests inbox and acknowledged by the next business day.

Goal Met	Current	Previous	Target	Trend
✗	88.24%	90.90%	100%	↓

Reporting Cycle: Quarterly (October 1, 2017 - December 31, 2017)

Additional Details: This does not include requests sent via channels other than the primary public requests inbox. Acknowledged is defined as a response sent back to requestor by the next business day. Business days do not include weekends or legal holidays.

Percentage of current employees completing public records training

Metric Definition

Percentage of current employees that completed public records training by March 1 of each calendar year.

Goal Met	Current	Previous	Target	Trend
✓	100%	100%	100%	↔

Reporting Cycle: Annual (March 1, 2017 - February 28, 2018)

Additional Details: Public records training is available to state employees via our enterprise learning management system. All state employees (permanent, project, and limited term) are required to complete this training. This metric is measured annually on March 1 for employees that started before February 1. Data does not include employees who completed the training, but left employment before the end of the reporting cycle.

Percentage of new employees completing public records training

Metric Definition

Percentage of new employees that completed public records training within 30 calendar days of their start date.

Goal Met	Current	Previous	Target	Trend
✓	100%	100%	100%	↔

Reporting Cycle: Rolling average updated quarterly (October 1, 2017 - December 31, 2017)

Additional Details: Public records training is available to state employees via our enterprise learning management system. All new state employees (permanent, project, and limited term) are required to complete the training within 30 calendar days of their start date.

Percentage of exiting employees that received notice of public records retention obligations

Metric Definition

Percentage of exiting employees that received notice of public records retention obligations on or before last day of employment.

Goal Met	Current	Previous	Target	Trend
✓	100%	100%	100%	↔

Reporting Cycle: Quarterly (October 1, 2017 - December 31, 2017)

Additional Details: It is required that all exiting employees receive notice of public records retention obligations on or before their last day of employment.